JIM TEGELER

Director, Client Services

Jim Tegeler joined Laird Norton Wealth Management in 2003 and is currently a director, client services. He brings to his work more than 20 years of experience in financial services and specializes in serving foundations, endowments and other non-profit clients, as well as high-net-worth individuals and families.

Jim is known for developing strong relationships with his clients, providing them with the analysis, insights and advice required for them to envision all their options and make the best possible decisions as new opportunities and challenges arise. He has deep expertise creating, managing and monitoring investment portfolios that are tailored to meet each client's unique needs and goals, currently and for decades to come.

Prior to joining Laird Norton Wealth Management, Jim worked for six years at Safeco Mutual Funds where he served in various roles, including client services manager and retirement plan specialist. He is a CERTIFIED FINANCIAL PLANNER™ professional and holds a bachelor’s degree in business administration from the University of Washington.